



STATEWIDE PERSONNEL
— S Y S T E M —

**Delegate the Initiation
of a
Business Process**

November 2014



Table of Contents

Delegate the Initiation of a Business Process	3
--	----------

Delegate the Initiation of a Business Process

How do delegations work? A worker that can initiate, approve, or perform other tasks may need (or want) to have someone else initiate or perform certain business processes. If you start business processes or tasks in Workday – such as hiring an employee, changing a position, creating new positions, etc. – you can delegate the initiation of the business process, if needed.



Delegations can be done on a one time basis, for a specific period of time. For example, if the initiator is on vacation.

NOTE:

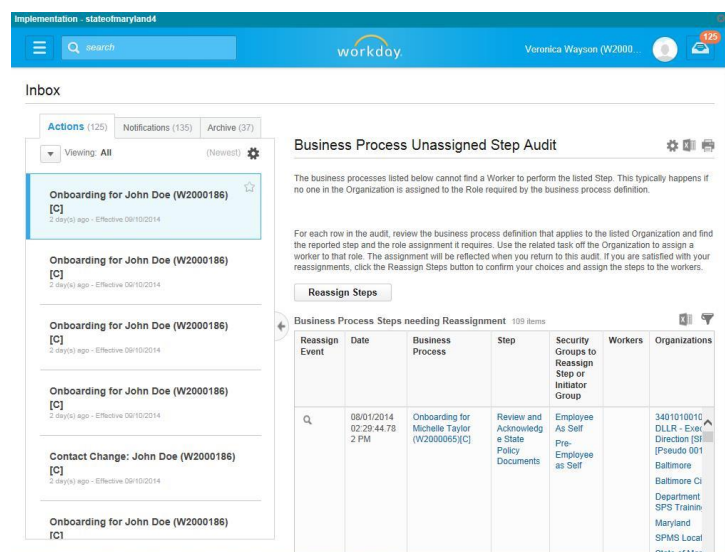
- If a supervisory organization has more than one person who holds some assigned roles, delegation may not be necessary as others in the unit with that role can initiate or approve as appropriate.
- When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.
- You can retain access to your inbox during the delegation period, if desired.
- Delegation begins at 12:00:01am on the Begin Date and ends at 11:59:59pm on the End Date.
- Your delegate also receives confirmation that he or she will be acting as your delegate for the specified period of time.

The procedure to delegate the initiation of tasks follow.

Procedure:


1. Click the Inbox  icon.
2. Click the **View Inbox**  hyperlink.

Inbox

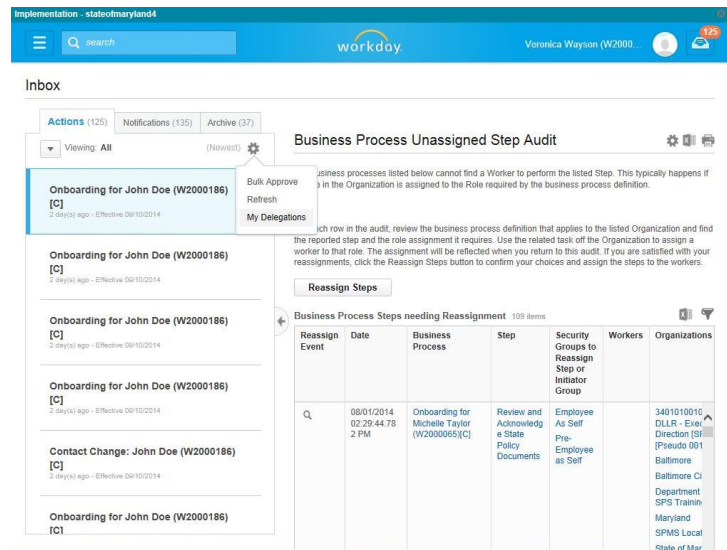


The screenshot shows the Workday interface for a user named Veronica Wayson. The inbox is displayed with a list of actions, including "Onboarding for John Doe (W2000186)" and "Contact Change: John Doe (W2000186)". To the right, there is a section titled "Business Process Unassigned Step Audit" which contains a table of business process steps needing reassignment.

Reassign Event	Date	Business Process	Step	Security Groups to Reassign Step or Initiator Group	Workers	Organizations
Q	08/01/2014 02:29:44.78 2 PM	Onboarding for Michelle Taylor (W2000095)(C)	Review and Acknowledge State Policy Documents	Employee As Self Pre-Employee as Self		3401010010 DLR - Exel Direction (SI) (Pseudo 001 Baltimore Baltimore CI Department SPS Trans Maryland SPMS Local State of Mar

3. On the Actions tab, click the Settings  icon.

Inbox

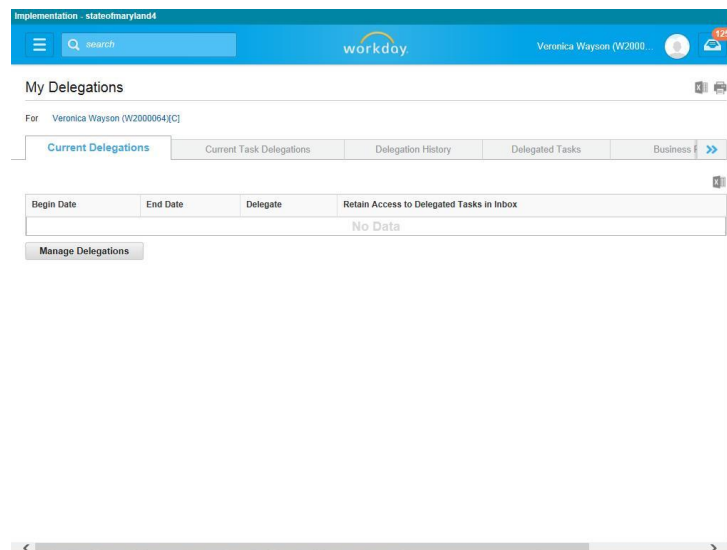


The screenshot shows the Workday 'Inbox' for user Veronica Wayson. It features a list of tasks on the left, including 'Onboarding for John Doe (W2000186)' and 'Contact Change: John Doe (W2000186)'. On the right, there is a 'Business Process Unassigned Step Audit' section with a 'Reassign Steps' button and a table of business process steps needing reassignment.

Reassign Event	Date	Business Process	Step	Security Groups to Reassign Step or Initiator Group	Workers	Organizations
Q	08/01/2014 02:29:44.78 2 PM	Onboarding for Michelle Taylor (W20000055)[C]	Review and Acknowledge State Policy Documents	Employee As Self Pre-Employee as Self		3401010010 DLLR - Executive Director [S] [Pseudo 001 Baltimore Baltimore Co Department SPS Trainee Maryland SPMS Local State of Mar

4. Click the **My Delegations** hyperlink.

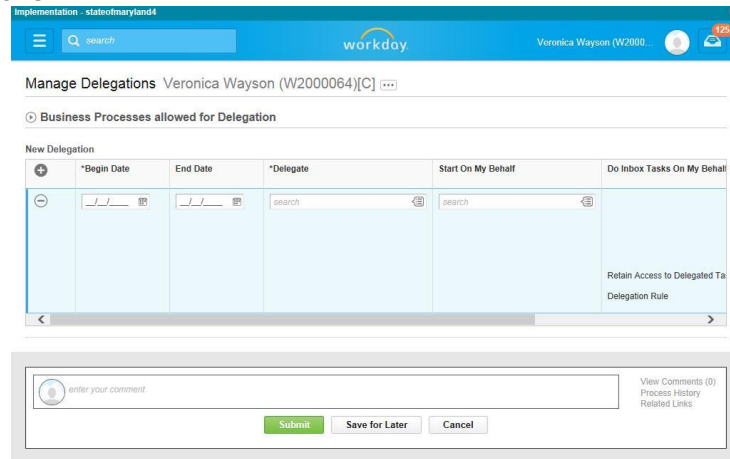
My Delegations



The screenshot shows the 'My Delegations' page for user Veronica Wayson. It includes tabs for 'Current Delegations', 'Current Task Delegations', 'Delegation History', 'Delegated Tasks', and 'Business'. Below the tabs is a table with columns for 'Begin Date', 'End Date', 'Delegate', and 'Retain Access to Delegated Tasks in Inbox'. The table currently shows 'No Data'. A 'Manage Delegations' button is located at the bottom left of the table area.

5. On the My Delegations page, click the **Manage Delegations** button.

Manage Delegations



System Status: The next Weekly Service Update and Quarterly Maintenance will be on Friday, September 19, 2014 from 6:00 AM to 6:00 PM. © 2014 Workday, Inc. All rights reserved.

6. If desired, click the arrow next to the Business Processes allowed for Delegation section. View the tasks that you are allowed to delegate. **Business Processes allowed for Delegation**
7. Click the Calendar button to select the Begin Date.
8. Click the Calendar button to select the End Date.



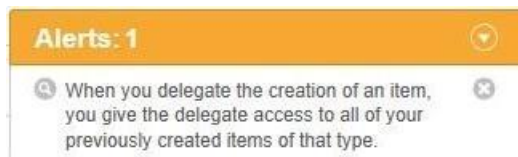
Information: To delegate for a single day, enter the same Begin Date and End Date.

9. Type or use the prompt to select the Delegate.



Information: You can delegate tasks to your peers (e.g., other individuals that are assigned your same role within your supervisory organization) or to your superiors (e.g., individuals in your management chain).

10. In the Start on My Behalf field, use the search prompt to choose the tasks that the Delegate will initiate on your behalf.
11. To retain access to your inbox during the delegation period, click the Retain Access to Delegated Tasks in Inbox ☐ checkbox.
12. Take note of the Alert that displays. Note that when you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.



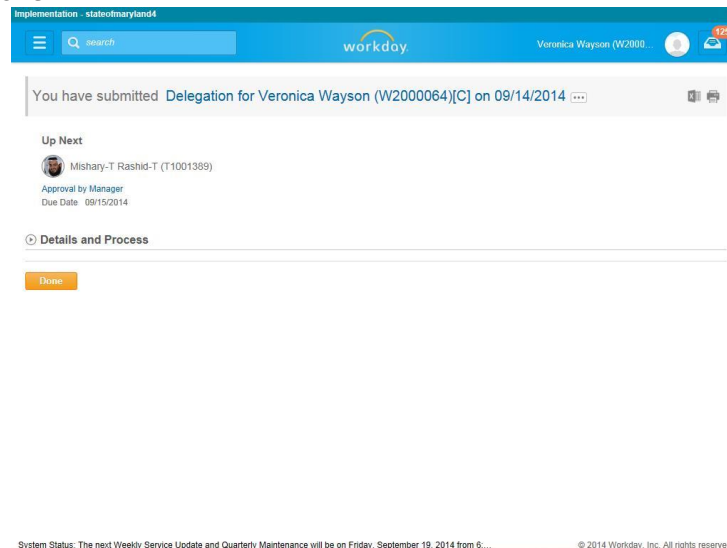
13. To add more delegations, click the Add a New Row  icon and enter the delegation details.
14. Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit
- Click **Cancel** to cancel the process and start at another time

Manage Delegations



15. Click the **Done** button.



Information:

- The task has been delegated. Some delegated tasks require approval by a manager which will be the next step in the process.
- Delegation requests can be updated or canceled at a later time, if needed. See the *Update or Cancel a Delegation Request* guide for details.

16. The System Task is complete.